



## 2020 Agency Manager Toolkit Certified Enrollers

### Overview

Agency Managers act in an administrative and operational role for an agency and must be a certified and licensed insurance agent. This Tool Kit is a “one-stop shop” for Covered California’s Agency Managers to review resources to assist in navigating the Agency Portal.

Resources include information to assist Agency Managers with viewing and exporting a Book of Business, transferring delegated consumers within the agency, adding new agents and admin staff to the agency, and much more.

*Check back frequently for updates.*

### Agency Support

Resource	Type	Description	Date Updated
<a href="#">Agency Manager Portal Walkthrough</a>	Video	Walkthrough of the Agency Manager Portal.	02/1/2018
<a href="#">Agency Portal</a>	Quick Guide	Agency Portal navigation overview.	02/14/2020
<a href="#">Add a New Agent to an Agency</a>	Job Aid	Instructions for Agency Managers to add new Agents in their Agency Portal.	02/14/2020
<a href="#">Edit Agent Within Agency</a>	Job Aid	Instructions for Agency Managers to edit profile information for Agents within their Agency.	02/14/2020
<a href="#">Acting on Behalf of an Agent within the Agency</a>	Job Aid	Instructions for Agency Managers to assist any consumers delegated to an Agent within the Agency.	02/14/2020
<a href="#">Health Care Sharing Ministries Policy and Procedures</a>	Policy	Outline of general policies, definitions of roles, and responsibilities of Covered California and Certified Insurance Agents	3/18/2020
<a href="#">Health Care Sharing Ministry Consumer Acknowledgement and Full Disclosure Form</a>	Form	Consumer Informed Consent and Acknowledgement form; side-by-side chart comparing Covered California Marketplace Plans and Health Care Sharing Ministries	7/24/2020

### Book of Business

Resource	Type	Description	Date Updated
<a href="#">Transferring Consumers Within an Agency</a>	Job Aid	Instructions to transfer consumer delegations between Agents within the Agency.	02/14/2020
<a href="#">Book of Business Export</a>	Job Aid	Instructions for Agency Managers to access an aggregate Agency Book of Business (BOB) or a BOB for any Agent within the Agency.	02/14/2020
<a href="#">Book of Business Export Individual Agency Within an Agency</a>	Job Aid	Instructions for Individual Agents within an Agency to extract their Book of Business from their CalHEERS portal.	02/14/2020

### Approved Admin Staff

Resource	Type	Description	Date Updated
<a href="#">Approved Admin Staff Portal</a>	Quick Guide	Information for Agency Managers on the Admin Staff Role in the Agency Portal.	05/16/2019
<a href="#">Add a New Admin Staff to an Agency</a>	Video	Walkthrough of adding a new Admin Staff to the Agency Portal.	7/23/2018
<a href="#">Add a New Admin Staff to an Agency</a>	Job Aid	Instructions for an Agency Manager to add an Admin Staff to the Agency Portal.	05/16/2019

For resources to support Admin Staff after they are approved by Covered California, review the [Approved Admin Staff Tool Kit found here](#) >>